

LINC is a lender/borrower matchmaking application integrated with the Capital Access Financial System (CAFS). CAFS is accessed via the CAFS Login System (CLS). The production URL is <https://caweb.sba.gov>. If you have questions, contact CAFS@SBA.gov.

Signing up for LINC is a 3 part process. The three steps are *I. Establish the Authorizing Official II. Set Up Account III. Set Up LINC Opt In Role (Optional)*.

I. ESTABLISH AUTHORIZING OFFICIAL (AO)

Before signing up for any CAFS application, make sure that your organization has registered an AO. All partner accounts must include an AO listed as a supervisor in the CLS profile. The AO is responsible for approving partner accounts and recertifying the accounts bi-annually. IF you have registered an AO and the AO is listed in your profile, skip to section II.

A. NEW CLS USER REQUESTING AUTHORIZING OFFICIAL ROLE

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. On the left navigation page, click "Create New SBA CLS Account".
3. Complete the sections labelled "Login Information", "Identity Information", "Contact Information" and "Business Associated with Account"
 - a. Under Identity Information
 - i. Select "Partner" for user type
 - ii. Enter the Headquarters Location Id for "Partner Location"
 - iii. Select "Authorizing Official" & "LINC Contact" under "Job Classification"
 - b. Under "Supervisor Information"
 - i. If you are the first authorizing official for a location id, complete the form and submit the request leaving the supervisor information blank. Send an email to CLS@SBA.gov with subject "PRODUCTION Authorizing Official Approval Request" OR "TEST Authorizing Official Approval Request".
 - ii. If there is/are authorizing official(s) associated already registered for your location id, enter either the first and last name OR email address of one of the AOs and click "Lookup Supervisor by Email OR First Name/Last Name. Complete the form and submit request.
4. You will receive an email verifying your email address. You must click the link in the email and verify your email address within 48 hours. If you do not respond within 48 hours, the request will be deleted.
5. Upon verification of email address, you will be asked to enter the LINC service areas on the same screen.
6. After the AO (if you are not your own AO) and OCA IT Security have approved the request, you will receive an email from cls@sba.gov that your account has been approved.

B. EXISTING CLS USERS REQUESTING AUTHORIZING OFFICIAL ROLE & THE USER DOESN'T HAVE AN AO IN THEIR PROFILE

1. Send an email to CLS@SBA.gov with subject "PRODUCTION Authorizing Official Approval Request" OR "TEST Authorizing Official Approval Request". In the email, request to be signed up as an AO.
2. You will receive an email from cls@sba.gov when your request has been granted.

C. EXISTING CLS USERS REQUESTING AUTHORIZING OFFICIAL ROLE & THE USER DOES HAVE AN AO IN THEIR PROFILE

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. Log into the system
3. At the top of the page, select "Profile"
4. Select "Authorizing Official" under "Job Classification"

After the AO (if you are not your own AO) and OCA IT Security have approved the request, you will receive an email from cls@sba.gov that your account has been approved.

II. Set Up CLS Account/Update Profile

Account access and requests must be approved by an AO. New users must set up an account and existing users must verify that there is a valid AO associated with their account. IF you have an account with an AO in the profile, skip to section III.

A. NEW CLS USER (Users who didn't have a GLS account prior to May 2015 OR Never Established a CLS Account)

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. On the left navigation page, click "Create New SBA CLS Account".
3. Complete the sections labelled "Login Information", "Identity Information", "Contact Information" and "User Information"
 - a. Under User Information
 - i. Select "Partner" for user type
 - ii. Enter the Location Id for "Customer Location"
 - iii. Select "LINC Contact" under "Job Classification"
 - b. Under Supervisor Information, enter either the first and last name OR email address of one of the AOs and click "Lookup Supervisor by Email OR First Name/Last Name. Complete the form and submit request.
 - c.
4. You will receive an email verifying your email address. You must click the link in the email and verify your email address within 48 hours. If you do not respond within 48 hours, the request will be deleted.
5. Upon verification of email address, you will be asked to enter the LINC service areas on the same screen.
6. After the AO (if you are not your own AO) and OCA IT Security have approved the request, you will receive an email from cls@sba.gov that your account has been approved.

B. EXISTING CLS

7. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
8. Log into the system
9. At the top of the page, select "Profile"
 - a. Under Identification Information
 - i. Select "Partner" for user type
 - ii. Under Partner information, Enter the Location Id for "Customer Location"
 - iii. Select "Authorizing Official" & "LINC Contact" under "Job Classification"
 - b. Enter the LINC service areas
10. Under "Supervisor Information", enter either the first and last name OR email address of one of the AOs and click "Lookup Supervisor by Email OR First Name/Last Name. Complete the form and submit request.

III. Set Up LINC Opt In Role (Optional).

Lender Opt In is an access role which allows LINC contacts to log in and review LINC requests. This feature is an added channel for LINC contacts to manage their LINC requests.

1. Go to the URL and agree to the terms in the warning banner by clicking "I agree to these terms".
2. Log into the system
3. At the top of the page, select "Access"
4. Click on the folder and select the box for LINC Opt In
5. You will receive an email that the account has been updated. THIS IS NOT AN APPROVAL FOR ACCESS.
6. After the access is approved by the AO (they will have 48 hours from your request), Program Office and the CLS security team, you will receive an email from cls@sba.gov.